

**Savannah District
Lotus Notes User's Manual**

DP 25-1-10

May 1998

I. Mail

A. Introduction

Notes mail lets you communicate electronically with other Notes users and with users of other e-mail products. You can exchange messages with people who are on the same local area network (LAN) or wide area network (WAN).

A Notes mail message is the same as any Notes document. For example, you can change fonts and colors, add file attachments and OLE objects, and include tables, graphics, Notes buttons, hotspots, and links. Each Notes user has a mail database in which to store mail messages.

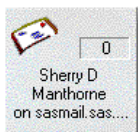
1. Start Lotus Notes

When you are prompted for your password, enter your Notes password and click OK.

2. Open Notes Mail

Notes mail may be opened using one of the following methods:

- a. Double-click the mail icon that has your name on it in the workspace



- b. Click the mail icon in the status bar, and then click Open Mail from the menu that appears.



- c. Click the Mail Open icon in the SmartIcons. For more information on adding smart icons to your toolbar, see section *User Preferences*.



3. About mail folders and views

Notes mail has the following default mail folders and views:

Inbox displays all mail that is received.

Drafts folder stores messages that you save without sending.

Sent folder stores all messages that you send (unless you turn off this feature in the User Preferences box).

DP 25-1-10
May 1998

All Documents view shows all the messages that are in your mail, including your inbox, the draft, sent, and all mail in folders.

Calendar view shows you your personal calendar, meetings, appointments, reminders, events and anniversaries that you put on your calendar.

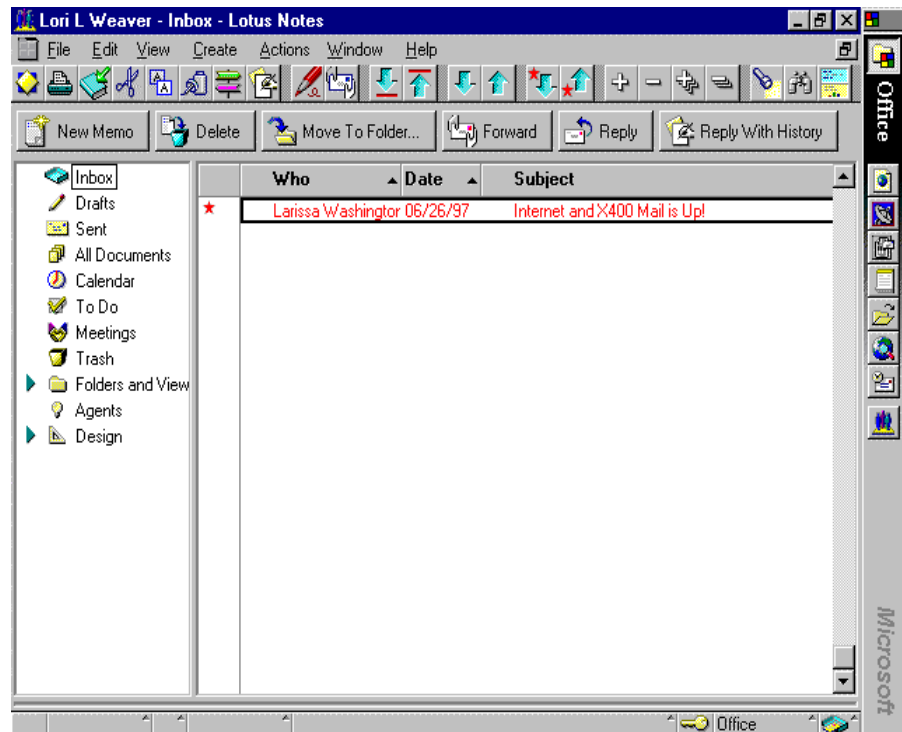
To Do view shows the status of all tasks that you have assigned to someone and all tasks that someone has assigned to you. It also shows messages that ask for a reply on or before a specific date.

Meetings view shows a list of the meetings and other calendar entries in your mail database.

Trash folder lets you store messages that you want to delete.

Discussion Thread shows messages grouped with their replies. This lets you view an entire (e-mail) conversation.

Archiving view contains lists of the documents you archived from this database. You can create as many additional folders and views as you want.



B. Create Mail

1. Creating a mail message from scratch

You can create a new mail message whether or not you are currently using your mail database.

- a. Do one of the following:
 - If you are using your Mail database, click the New Memo button or choose Create - Memo to display the Memo form.
 - If are using a different database, choose Create - Mail - Memo to display the Memo form.
 - Click the mail icon in the status bar, and then click Create Memo from the menu that appears.
 - If you are using your Personal Address Book, switch to the Business Cards view, select the names of the people to whom you want to send the message by clicking in the column to the left of the name, and click Write Mail Memo.
- b. Enter addressing information in the To field. (See below for additional information on addressing mail)

Note If you selected names of people from your Personal Address Book in step 1, Notes automatically displays the selected names in the To field.
- c. (Optional) Enter addressing information in the cc and bcc fields if you want someone to receive a copy or a blind copy of the message.
- d. Type a subject in the Subject field.
- e. Type the body of the message.
- f. (Optional) Click Delivery Options, and change any delivery options you want. (Delivery Options are discussed in a later section of this guide.)
- g. Send or save the message.

2. Addressing Mail

a. Quick-address method

Notes helps you address messages by displaying names that contain the letters that you type in the To, cc, and bcc fields. You can select a name rather than type the entire name.

- 1) In the To, cc, or bcc field of the message, type the first letter or two of the name of a person or group to whom you want to send the message.
- 2) If the name that Notes displays is not the name you want, type additional letters in the name.

3) If Notes displays the name you want, do one of the following:

- Press ENTER to accept the name and look for an additional name.
- If there are no more names to add to this field, press the down arrow to move to the next field.

If Notes does not display the name you want, type the entire name and address.

NOTE -- Use the CC field for information copies and the TO field for action addressees.

b. Choosing names from an Address Book

You can select recipient names directly from one or more Address Books.

- 1) While creating a message, click the Address button.
- 2) Notes displays the Mail Address dialog box. The last address book you used will appear.
- 3) (Optional) To display names from a different Address Book, click the Address Book drop-down list, and choose a different Address Book.
- 4) In the list of names, select the name of a person or group to whom you want to send your message. If necessary, scroll to the name.

Tip To find the name more quickly, click any name in the list of names and then type the first few letters of the name you want. Notes displays a dialog box that lets you type as much of the name as you want. When you click OK, Notes selects the first name that begins with the letters you typed.

- 5) Click either To, cc, or bcc to place the name in one of the address fields in the message. (You can also drag names from the list of names to the To, cc, and bcc fields.)
- 6) Repeat steps 3 and 4 until you have chosen all the people and groups you want to receive the message.
- 7) Click OK.

c. Addressing Internet Mail

To send Internet mail, you must use the following address structure:

name@address AT Internet@ccmail-domain

for example: moreau@cpoc-benning.army.mil AT Internet@ccmail-domain

You may want to add your frequently used internet mail recipients to your personal address book. An easy way to do this is to add their name while reading a message you received from them.

- Choose Actions - Mail Tools - Add Sender to Address Book.

Tip: You can select multiple messages in the view pane and add their authors to your Personal Address Book simultaneously.

For more information on addition people to your address book see section on **Address Books**.

3. Attachments

In your mail, click the New Memo button.

- a. Notes displays a new memo for you to complete.
- b. Provide an address. (Either click the address button to use the address book or type a few letters of the person's name to use the Quick Addressing feature.)
- c. Complete the subject and type any text you want to include in the mail message. Press Enter to start a new line before attaching the document. Click the File Attach Icon (the paper clip symbol).
- d. Notes displays the create attachments dialog box. Find the file you wish to send as an attachment.
- e. Notes inserts an attachment icon in your message.

4. Delivery Options

a. **Informing recipients your message is important**

You can tell Notes to display an icon next to important messages.

- 1) While creating the message, click Delivery Options.
- 2) In the Importance drop-down list, select one of the following:
 - Normal
 - High
 - Low

* If you select High, Notes displays a special icon next to the message in the recipient's mail inbox.

- 3) Select any other delivery options you want.
- 4) Click OK.

b. Indicating the type of message you are sending

You can indicate that your message is a particular type of message, such as a personal message, a reminder, or a thank you message. Notes displays an icon next to the message to denote its type.

- 1) While creating the message, click Delivery Options.
- 2) In the "Mood stamp" drop-down list, select a message type.
- 3) Select any other delivery options you want.
- 4) Click OK.

Notes displays an icon for each message type except Normal.

c. Confirming that Notes delivered your message

You can request that Notes notify you when it delivers a message that you've sent.

- 1) While creating the message, click Delivery Options.
- 2) In the "Delivery report" drop-down list, select one of the following:
 - Only on failure
 - Confirm delivery
 - Trace entire path
 - None
- 3) Select any other delivery options you want.
- 4) Click OK.

d. Confirming that recipients read your message

You can request that Notes notify you when a user reads a message that you've sent.

- 1) While creating the message, click Delivery Options.
- 2) Click "Return receipt."
- 3) Select any other delivery options you want.

- 4) Click OK.

e. Signing your messages

Notes lets you include a digital signature in your messages. This signature assures the recipients that you are the person who created the message. You can set up Notes to automatically sign all messages that you send, or you can sign individual messages when you send them.

- 1) Signing all messages that you send
 - a) Choose File - Tools - User Preferences.
 - b) Click the Mail icon.
 - c) Select "Sign sent mail."
 - d) Click OK.
- 2) Signing individual messages when you send them
 - a) While creating the message, click Delivery Options.
 - b) Click Sign.
 - c) Select any other delivery options you want.
 - d) Click OK.

f. Preventing recipients from copying or printing a message

You can prevent recipients from copying a message that you send. This includes copying with the clipboard, forwarding, creating a Reply with History, and printing.

- 1) While creating the message, click Delivery Options.
- 2) Click "Prevent copying."
- 3) Select any other delivery options you want.
- 4) Click OK.

Note This setting is merely a deterrent to copying. Recipients can still use other means to copy the message.

g. Specifying the date on which you want a reply

You can tell Notes to include a line in a message asking the recipient to reply by a particular date. Notes displays these messages in the recipient's To Do view (as well as the Inbox).

- 1) While creating the message, choose Actions - Special Options.
- 2) Enter a date in the "Stamp message with a 'Please reply by' date" box.
- 3) Select any other special options you want.
- 4) Click OK.

5. Telling Notes to ask you about saving each message

You can tell Notes to ask you if you want to save each message when you send it.

- a. Choose File - Tools - User Preferences.
- b. Click the Mail icon.
- c. In the "Save sent mail" drop-down list, select "Always prompt."
- d. Click OK.

Note If you select "Yes" when Notes asks if you want to save a message, Notes saves the message in the Sent view

6. Saving a message without sending it

You can save a draft of a message until you are ready to complete it and send it.

- a. Create all or part of the message.
- b. Click "Save As Draft."

Notes saves the message in the Drafts view. You can edit the message in the Drafts view and send it at any time.

C. Reading Mail

Reading mail is done by double clicking on the message. Unread messages appear in your inbox with a star beside them and are usually a different color. When you receive new mail, Notes will notify you that you have new mail. New messages will not be displayed until you "refresh" the screen by pressing F9 or selecting View - Refresh.

1. Reading messages that you receive

Notes automatically places messages that you receive in the Inbox folder, where they remain until you delete them or move them to other folders. You read a mail message the same way you read any Notes document: by opening it (double-clicking its title) or by reading its contents in the preview pane. You can set up the preview pane doing the following from your inbox view: select View - Document Preview.

- a. Open the Inbox folder.
- b. Do one of the following:
 - Open the message that you want to read.
 - Click the message title, and read the message in the preview pane.

Messages that you have not read usually have stars to the left of their titles in the view pane. In addition, their titles are often a different color than the other message titles.

2. Viewing attachments

If a document contains a file attachment, Notes displays a paper clip to the left of the document in the view or folder. In the document, Notes displays an icon representing the attachment.

You can do the following:

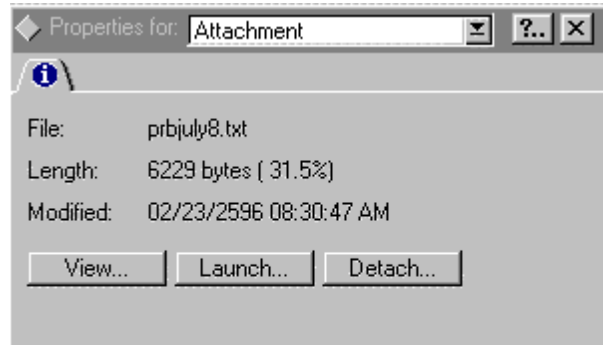
- Double click the attachment to get information about the attached file.

You then have several options, you can:

- Click View to look at the file,
- Detach the attached file, that is, save the file to disk. OR
- Launch an attached file, if you have the application the file was created with.

DP 25-1-10

May 1998



Note: The properties box shown above displays on your screen after selecting an option -- simply click the X in the top right corner of the box to move it out of your viewing area.

3. Editing Attachments

If someone sends you an attachment for you to make changes to and return back to them, first detach the file. Then open it in its original application (i.e. Microsoft Word), make your changes, save the file, and create a new nail message, attaching the changed file to return back to the sender. Send the file back with a slightly modified file name, maybe with an R at the end of the file name so the recipient knows that you have made revisions and doesn't overwrite their original with your revised file.

4. Reply Options

You can reply to the sender of a message or to the sender and all recipients of the message. You can also include the original message in your reply.

- a. Select or open the message to which you want to reply.
- b. Do one of the following:

- Click "Reply" to create a reply.

NOTE: Notes mail does not automatically include the original message when you choose to reply to mail.

- Click "Reply With History" to include the original message in your new message.
- c. (Optional) If you want Notes to deliver the reply to all the people who received the original message, click "Reply To All." Notes places the names of these people in the cc field.
 - d. (Optional) Add the names of any other people you want to receive the message.
 - e. Complete and send the message like any other message.

4. Forwarding a message or document

- a. Select or open the message or document you want to forward.
- b. Choose Actions - Forward or click on the Forward button.
- c. Notes creates a new message that includes the original message or document.
- d. Address the new message.
- e. (Optional) Write a comment or explanation above the original message or document.
- f. (Optional) Edit or make comments in the original message or document.
- g. (Optional) Click Delivery Options, and change any delivery options you want.
- h. Send the message.

5. Forwarding multiple messages or documents as a single message

- a. In any folder or view in your mail database or in most other databases, select all the messages or documents you want to forward. (Clicking to the left of the message places a check mark next to the document. This means the document is selected)
- b. Choose Actions - Forward.
- c. Notes creates a new message that includes all the selected messages or documents.
- d. Address the message.
- e. (Optional) Write a comment or explanation above the original messages or documents.
- f. (Optional) Edit or make comments in the original messages or documents.
- g. (Optional) Click Delivery Options, and change any delivery options you want.
- h. Send the message.

Tip Forwarding is a convenient way to combine several short messages into a single message in your mail database. Simply forward the combined message to yourself, and then delete the original messages.

6. Horizontal Scroll Bar

Occasionally you will receive mail – either from cc:Mail or internet mail that will scroll off the viewing area of your screen. To be able to scroll left and right to see the entire message, you will have to turn on the Horizontal Scroll Bar function. This is done from the menu bar by selecting View – Show – Horizontal Scroll Bar.

D. Deleting Mail

1. Deleting messages from the view pane

- a. Select the messages that you want to delete. You can select as many messages as you want.
- b. Click Delete or press DEL.
- c. Notes marks the messages for deletion (a trash can will appear next to the message).

Note If you mark a message for deletion by mistake, select that message and press DEL to unmark it.

- d. Choose Actions - Empty Trash to delete the marked messages.

Note When you delete a message, Notes deletes it entirely from the database. If you only want to remove a message from a folder, use Actions - Remove From Folder.

2. Deleting messages when you read them

- a. While reading a message, click Delete or press DEL.
- b. Notes marks the message for deletion and displays the next message.
- c. As you read additional messages, click Delete or press DEL in any messages you want to delete.

Note If you mark a message for deletion by mistake, open the Trash folder, select that message, and press DEL to unmark it.

- d. When you are ready to actually delete the messages, choose Actions - Empty Trash.

One thing to keep in mind with Notes mail is that when you delete a message from either the All Documents view or the Discussion Thread - the message is deleted from the folder where you had it stored. It does not keep a separate copy.

E. Miscellaneous Mail Features

1. Sending a message to recipients sequentially

You can send a message sequentially to a list of recipients. Each recipient has the option of adding a comment and sending the message to the next person.

- a. Do one of the following:
 - If you are using your Mail database, choose Create - Special - Serial Route Memo.
 - If you are using a different database, choose Create - Mail - Special - Serial Route Memo.
- b. In the "Route to" field, enter the recipients in the order in which you want them to receive the message. Separate the names with commas.
- c. Complete the rest of the message as you would any other message.
- d. (Optional) Click "Notify sender at each stop" if you want Notes to send you a message each time a recipient receives the message.
- e. Click Send To Next Person.

2. Forwarding a sequential message to the next person

If you receive a serial route message, add a comment if you want, and then send the message to the next person on the recipient list.

- a. Click Edit Document.
- b. (Optional) Add a comment to the message.
- c. (Optional) Click Delivery Options, and change any delivery options you want.
- d. Click Send To Next Person.

3. Preview Pane

The preview pane lets you read the content of the selected document without having to open the message. To adjust the size of the preview pane, drag the Preview Pane Size Bar to the desired position.

You can set three different automatic pane arrangements.

- a. Choose View - Arrange Preview.
- b. Click the icon for the arrangement you want.
- c. Click OK.

4. Changing Letterhead

You can choose from several letterhead styles to put at the top of the messages you create.

- a. Choose Action - Mail Tools - Choose Letterhead.
- b. Select the name of the letterhead you want to use.

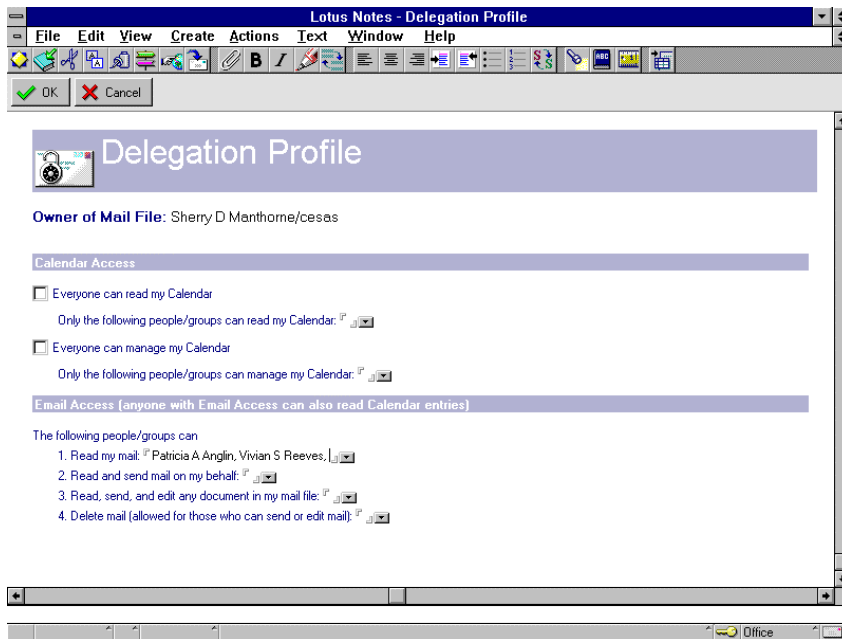
Note: For no letterhead, select "Plain Text."

- c. Click Done.

5. Letting Other People Check Your Mail

You can let other people read your mail, send messages for you, and delete messages based on the level of access you give them.

- a. Choose Actions - Mail Tools - Delegation Profile
- b. In the E-mail access section of the profile, do one of the following:
 - To let users read your mail, enter their names in the "Read my mail" field.
 - To let users read your mail and send mail on your behalf, enter their names in the "Read and send mail on my behalf" field.
 - To let users read your mail, send new messages, and edit existing messages, enter their names in the "Read, send, and edit any document in my mail file" field.
 - To let users delete messages, enter their names in the "Delete mail" field. Notes will ask if you want to let them delete your messages or only the messages they create themselves.
- c. Click OK



6. Creating a phone message

If you take a phone call or some other kind of message for a person who is out of the office, you can send them a special message about it.

- a. Do one of the following:
 - If you are using your Mail database, choose Create - Special - Phone Message.
 - If you are using a different database, choose Create - Mail - Special - Phone Message.
- b. Enter addressing information in the To, cc, and bcc fields.
- c. In the Contact field, type the name of the person who left the message.
- d. (Optional) Enter information in the "of," "Phone," and "Fax" fields.
- e. Click any applicable options at the bottom of the form.
- f. (Optional) In the Message field, type a message.
- g. (Optional) Click Delivery Options, and change any delivery options you want.
- h. Send the message.

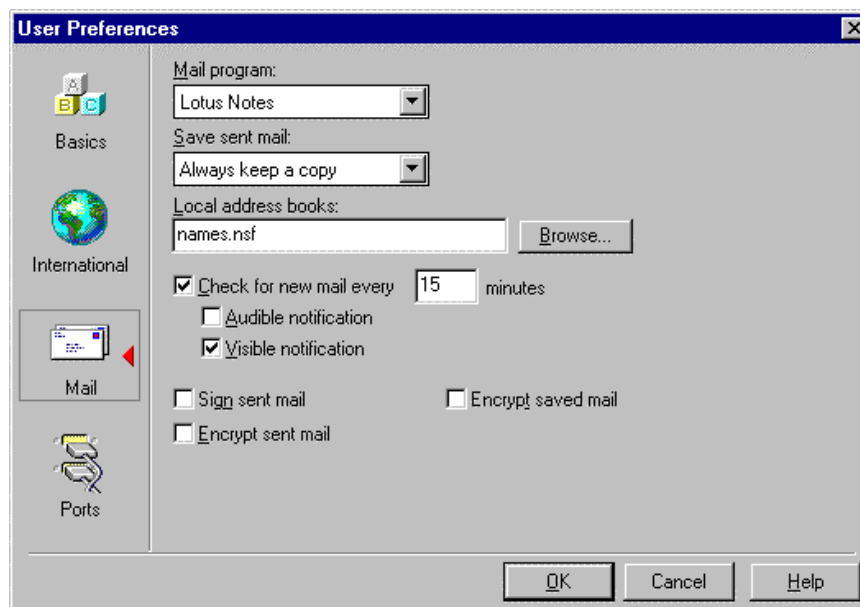
F. User Preferences

1. Starting Mail Automatically

To set Notes mail to come up automatically when you start notes, use the following steps:

- a. Click on File
- b. Tools
- c. User Preferences
- d. Click on Start-up database
- e. Select your name as the database to open at start up.
- f. Click OK to accept changes

The next time you start Lotus Notes, your mail database should open automatically after you have entered your password.



2. Telling Notes to notify you when you have new mail

You can tell Notes to beep, display a message in the status bar, and display a dialog box when you receive new mail.

- a. Choose File - Tools - User Preferences.
- b. Click the Mail icon.
- c. Select "Check for new mail every x minutes."

- d. Fill in a number to indicate how often you want Notes to check for new mail.
- e. (Optional) Choose "Audible notification," "Visible notification," or both.
- f. Click OK.

Note If you do not want Notes to notify you when you have new mail, deselect "Check for new mail every x minutes."

"Audible notification" sounds a chime when you have new mail. "Visible notification" displays a dialog box telling you that you have new mail. Notes displays this dialog box even if you are working in a different application. You can use the dialog box to open your mail database.

3. Adding SmartIcons to your tool bar

- a. Choose File - Tools - SmartIcons.
- b. In the box above the second column of icons, select the SmartIcons set you want to modify.
- c. Drag the icon you want to add from the Available icons column to the second column.
- d. Click OK.

Note When you drag an icon from the Available icons column, a copy of the icon remains in the Available icons column so you can add the icon to additional sets.

G. Document Management

You are allowed 25mg space in your mail database and any message over 30 days old is automatically be deleted. If you reach the 25mg limit, you will not be able to send or receive mail. Any documents you want to save for future reference must be saved to your hard drive. You can save messages for future reference 2 ways -- Archiving, or saving individual documents to folders on your hard drive. The Document Search feature discussed later in this section will assist in locating archived files.

As with any valuable data, it is important that you properly back up critical files located on your hard drive. The archive file is in the notes\data\mail directory. By default, the archive database name begins with the characters A_ followed by the first six letters of the name of your mail database.

1. Archiving

a. Archiving messages automatically

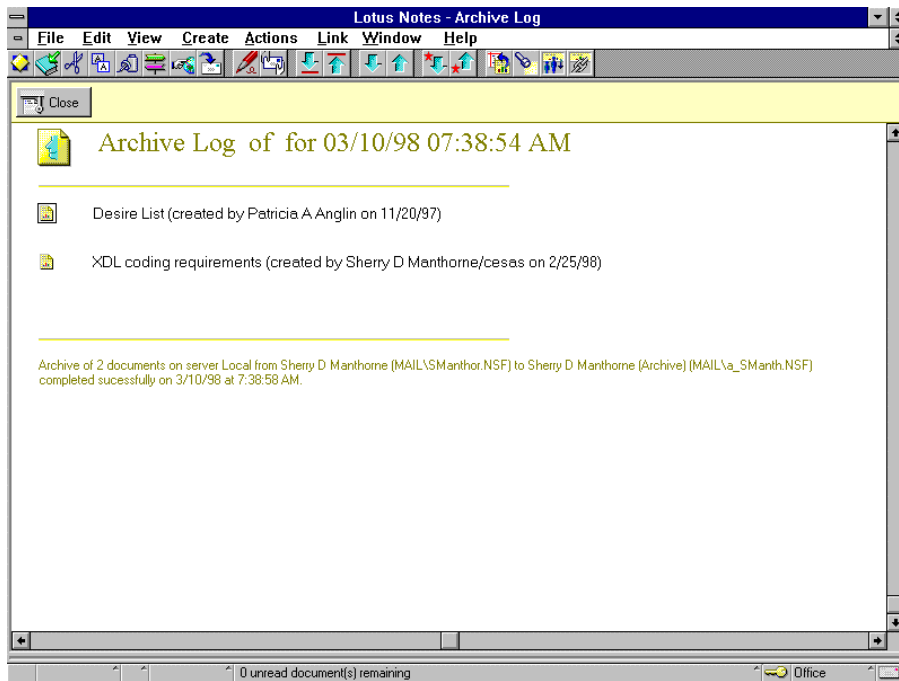
You can have Notes archive messages automatically when those messages meet certain criteria. Notes moves the messages to a separate archive database. This can save space on the file server and make your mail database easier to manage.

- 1) Open the Archiving view in your mail database by double-clicking the Archiving View icon in your navigator pane.
- 2) Click "Setup Archive" button on the action bar.
- 3) Choose whichever options you want on the Archive Profile form.

If you choose Generate an Archive Log, all the files archived will be listed in a log in the Archive section of your mail database. Double clicking on a log will display a list of archived files. To view a particular file, click on the icon next to its name. Below is a sample Archive Log.

- 4) Specify a location and file name for your archive database:
 - Click "Specify Archive Location."
 - In the "Documents are archived" field, choose Locally.
- 5) Click "Save Profile."
- 6) Click Close.
- 7) To enable automatic archiving, click "Enable Scheduled Archiving."

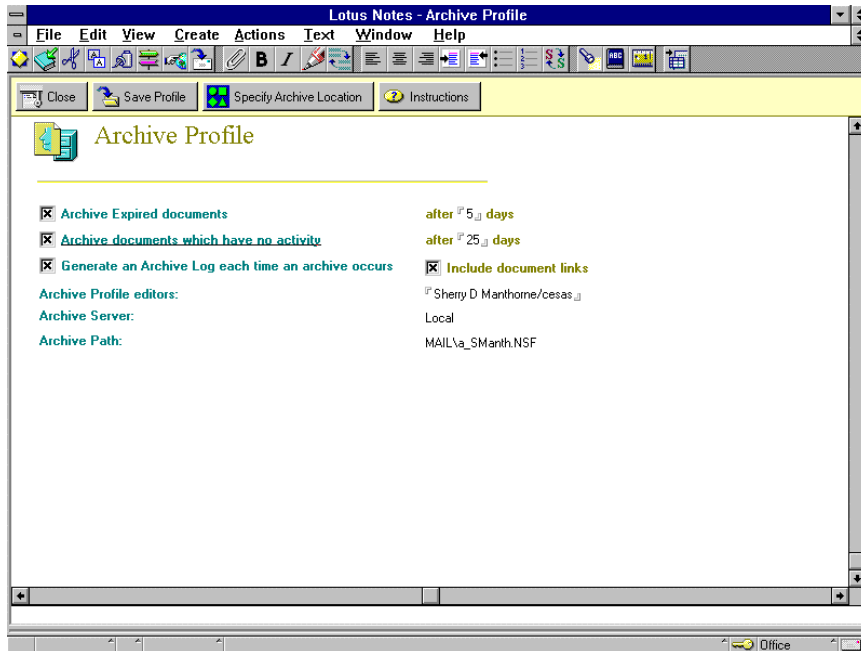
Note To turn off automatic archiving, open the Archiving view and click "Disable Scheduled Archiving."



If you want to change the criteria Notes uses for archiving mail messages, you can edit the Archive Profile.

- 1) Open the Archiving view in your mail database by double-clicking the Archiving View icon in your navigator pane.
- 2) Click "Setup Archive."
- 3) Make changes in whichever fields you want.
- 4) Click Close.
- 5) When Notes asks if you want to save the document, click Yes.

DP 25-1-10
May 1998



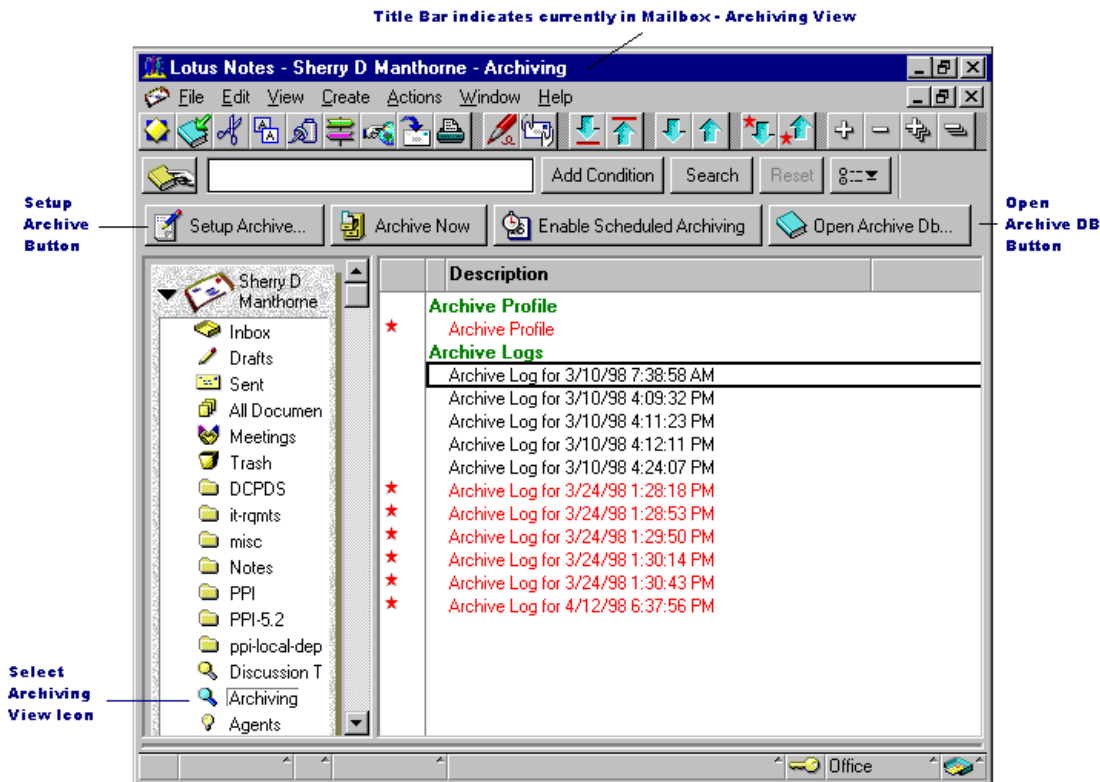
b. Archiving messages manually

- 1) Select the messages that you want to archive by clicking to the left of the document .
- 2) Choose Actions - Mail Tools - Archive Selected Documents.

If you want to organize your archives in folders do the following for each group of documents to be placed in a folder.

- 1) Select the messages in a folder that you want to archive.
- 2) Choose Actions - Mail Tools - Archive Selected Documents
- 3) Switch to the Archive database by clicking on Archiving.
- 4) Open the Archive database by clicking on the button "Open Archive DB".
- 5) Click on All Documents.
- 6) The documents you just archived will be red in color. Select all the red documents and drag to the desired folder.
- 7) Mark documents as read by selecting Edit - Unread Marks - Mark all read.
- 8) All the documents will now be black.
- 9) Press escape to return to your Mail Database.
- 10) Follow steps 1-6 for each folder you are archiving.

Note -- When you are in your mailbox, the title bar will have your name followed by the folder or view you are in. When you are in your mail archive, the title bar will have your name followed by (Archive), then the folder or view you are in. Paying attention to this bar will help prevent confusion as to whether you are in your mailbox or your archives.



c. Viewing messages in the archive database

- 1) Open the Archiving view in your mail database.
- 2) Click "Open Archive Db."

Notes opens the database that contains your archived messages.

- 3) Open messages as you normally would in your mail database.

d. Viewing messages from the archive log

You can view messages from the archive log if you chose both of the following commands when you created the archive profile: "Generate an archive log each time an archive occurs" and "Include document links."

- 1) Open the Archiving view in your mail database by double-clicking the Archiving View icon in your navigator pane.

DP 25-1-10
May 1998

- 2) Open the archive log that contains a message you want to view.
- 3) Click the link for a message you want to view.
- 4) After reading the message, close it.
- 5) Repeat Steps 2 through 4 until you have viewed all of the messages you want.

2. Saving Files to Folders on your Hard Drive

a. Detaching an attached file

You can save a file attachment to disk. If more than one file is attached to a document, you can save some or all of the files to disk at once.

- 1) Do one of the following:
 - To detach one file, double-click the attachment.
 - To detach some but not all files in a document, drag over the part of the document that contains the files you want, and choose Attachments - Detach All Selected
 - To detach all files in a document, select any attachment, and choose Attachment - Detach All.
- 2) Specify the drive and directory in which you want to store the file(s).
- 3) Click Detach.

b. Exporting a document to a file

You can convert part or all of a mail document so that other applications can use it.

- 1) Open the document you want to export.
- 2) (Optional) To export only part of the document, select the part you want to export.
- 3) Choose File - Export.
- 4) Under "Save File as Type," select a file type.
- 5) Select the drive and directory you want to export the data to.
- 6) Under File Name, do one of the following:
 - To create a new file with the exported data, enter a unique file name and extension.
 - To replace data in an existing file with the exported data, select the file.
- 7) Click Export.
- 8) If you specified an existing file in step 6, click Replace.
- 9) If you selected ASCII Text format in step 4, specify a line length and click OK.

3. Document Searches

Document searches can make it easier to locate a document that has been archived.

The procedure for doing this in a database that is not full text indexed is different than the procedure in a database that is full text indexed. Prior to doing either type of search, be sure the database is open to the view you want to search.

a. If the database is not full text indexed

- 1) If the search bar is not visible, choose View - Search Bar.
- 2) In the search bar text box, type the text that you want to find.
- 3) Click Search.

b. If the database is full text indexed

You can use the method above or the following method, which gives you more options for searching.

- 1) If the search bar is not visible, choose View - Search Bar.
- 2) In the search bar, click Add Condition.
- 3) In the Condition drop-down list, leave the default value, "Words and Phrases."
- 4) In the first numbered text box, type the word or phrase you want to find.
- 5) Click OK.
- 6) Click Search in the search bar.

If you see the Add Condition on the search bar, your mail database is full text indexed. If you don't see that button, you can create a full text index. If the search bar is not visible, choose View -- Search Bar and then click on the Create Index icon in the search bar to make your database a full-text indexed database.

Note: After completing a search, click reset to refresh the view.

4. Checking the size of your mail database


If you receive and send large volumes of mail, it is recommended you periodically check the size of your mail database to ensure you are not approaching the 25mg limit. If you reach the 25MG limit, you will not be able to send or receive mail.

- Select the mail database icon by clicking on it once. Choose File - Database - Properties, and click the Info tab .

The size is listed above the % used button.

5. Compacting a database

A Notes database contains usable documents and unused space. Deletion of many documents or large attachments can cause considerable amounts of unused space, which takes up disk space unnecessarily. Compacting removes the unused space.

- a. Select the database icon, choose File - Database - Properties, and click the Info tab .
- b. Click % used.
- c. If the percentage of a database in use drops below 90% (it contains more than 10% unused space), click Compact to compact the database. This may take a minute or two.

H. Address Books

1. Creating addresses in your Personal Address Book

You enter information about a person into your Personal Address Book so you can more easily address mail to that person. Instead of typing the person's full address, you need to type only the person's name or choose the name when Notes displays it, depending on the method of addressing you are using.

- a. Select or open your Personal Address Book.
- b. Select Business Cards.
- c. Choose Add Card.
- d. Type in the user's first and last name within the [] or click on the down arrow and fill in the fields.

Note You can enter more than one name for the person (such as a distinguished name and a nickname).

- e. In the email address field, enter the complete email address for the user.
- f. (Optional) Add information in as many of the other fields as you want.
- g. Save and close the document.

2. Adding a Sender to your Address Book

The easiest way to add a person to your address book is while you're reading the mail message.

- a. Choose Actions - Mail Tools - Add Sender to Address Book.
- b. Click OK.

3. Creating a mail group

If you frequently send messages to the same group of people, you can create a mailing list to make it easier to address messages to the group. Instead of addressing the message to each person individually, you can address the message to the name you give the mailing list. You create the mailing list in your Personal Address Book.

- a. Select or open your Personal Address Book.
- b. Click on Groups.
- c. Choose Add Mailing List.
- d. In the "Group name" field, type a name for the group.
- e. In the "Group type" field, select Multi-purpose or email.
- f. (Optional) In the Description field, type a description of the group.
- g. In the Members field, type the names of the group members. After each name, type a comma or press ENTER.
- h. Save the document.
- i. Close your Personal Address Book.

II. Calendar

A. Introduction

1. About the Calendar

The calendar is a view in your Notes mail database which you can use to manage your time and to schedule meetings. You can add appointments, meetings, reminders, events, and anniversaries to the Calendar view. You can also display tasks in the Calendar view.

You can display the Calendar view in four different formats: two days, one week, two weeks, and one month. In the following illustration, the Calendar view is displayed in one-week format.

B. Calendar Functions

1. About the Calendar Profile

The calendar profile lets you indicate the time during the week that you're normally available for meetings. Notes saves this information in a database on your mail server so that others can read your [free time schedule](#) and [look up your free time for meetings](#).

The calendar profile also lets you customize your calendar. For example, you could use the calendar profile to change the default length of appointments and meetings and set an alarm for all anniversaries. To specify calendar profile options, choose Actions - Calendar Tools - Calendar Profile.

Note Make sure that your name is specified in the "Mail File Owner" field in your calendar profile.

2. Turning to a Different Calendar Page

To turn back or forward one page in the Calendar view, do one of the following:

Click the dog-ear in the bottom left or right corner of the calendar.



Press Page Up or Page Down.

To turn to a specific date, do one of the following:

Click the date icon at the top of the calendar and [specify the date](#) you want to turn to.




Choose View - Calendar - Go To, specify the date you want to turn to, and click OK.

To turn to the current date, click Go To Today.

C. Ways to Create Calendar Entries

1. Adding an Appointment to the Calendar

- a. If necessary, switch to the Calendar view.
- b. Click New Entry or double-click the date of the appointment.
- c. Select Appointment.
- d. Enter a description of the appointment in the Brief description field.
- e. If necessary, [specify the date](#) of the appointment in the Date field by clicking on the date icon .
- f. [Specify the time](#) of the appointment in the Time field by clicking on the time icon.
- g. (Optional) Do any of the following:
 - To [set an alarm for the appointment](#), click Alarm options, specify when you want the alarm to go off, and click OK.
 - To [make the appointment a repeating appointment](#), click Repeat, specify how often and for how long you want the appointment to repeat, and click OK.
 - To keep the selected time free for meetings, select Pencil in.
 - To hide the appointment from [other users who can read your calendar](#), select "Not for public viewing."
 - To include more information about the appointment, enter it in the Detailed description field.
- h. Click "Save and Close."

Notes adds the appointment to the Calendar and Meetings views and marks the specified time busy in your [free time schedule](#) (unless you selected Pencil in).

Tip To view your calendar while you're filling out the appointment form, click Check Calendar. To return to the appointment form, press ESC.

2. Adding a Reminder to the Calendar

- a. If necessary, switch to the Calendar view.
- b. Click New Entry or double-click the date on which you want the reminder.
- c. Select Reminder.
- d. Enter a description of the reminder in the Brief description field.
- e. If necessary, [specify a date](#) for the reminder in the Date field.
- f. [Specify a time](#) for the reminder in the Time field.
- g. (Optional) Do any of the following:
 - To [set an alarm for the reminder](#), click Alarm options, specify when you want the alarm to go off, and click OK.
 - To [make the reminder a repeating reminder](#), click Repeat, specify how often and for how long you want the reminder to repeat, and click OK.
 - To hide the reminder from [other users who can read your calendar](#), select "Not for public viewing."
 - To include more information with the reminder, enter it in the Detailed description field.
- h. Click "Save and Close."

Notes adds the reminder to the Calendar and Meetings views.

Tip To view your calendar while you're filling out the reminder form, click Check Calendar. To return to the reminder form, press ESC.

3. Adding an Event to the Calendar

- a. If necessary, switch to the Calendar view.
- b. Click New Entry or double-click the first date of the event.
- c. Select Event.
- d. Enter a description of the event in the Brief description field.
- e. If necessary, [specify the first date](#) of the event in the Date field.
- f. Specify the number of days the event lasts in the Duration field.
- g. (Optional) Do any of the following:
 - To [set an alarm for the event](#), click Alarm options, specify when you want the alarm to go off, and click OK.

- To [make the event a repeating event](#), click Repeat, specify how often and for how long you want the event to repeat, and click OK.
- To keep the selected date(s) free for meetings, select Pencil in.
- To hide the event from [other users who can read your calendar](#), select "Not for public viewing."
- To include more information about the event, enter it in the Detailed description field.

h. Click "Save and Close."

Notes adds the event to the Calendar and Meetings views and marks the specified date(s) busy in your [free time schedule](#) (unless you selected Pencil in).

Tip To view your calendar while you're filling out the event form, click Check Calendar. To return to the event form, press ESC.

4. Adding an Anniversary to the Calendar

- a. If necessary, switch to the Calendar view.
- b. Click New Entry or double-click the date of the anniversary.
- c. Select Anniversary.
- d. Enter a description of the anniversary in the Brief description field.
- e. If necessary, [specify the date](#) of the anniversary in the Date field.
- f. (Optional) Do any of the following:
 - To [set an alarm for the anniversary](#), click Alarm options, specify when you want the alarm to go off, and click OK.
 - To [make the anniversary a repeating anniversary](#), click Repeat, specify how often and for how long you want the anniversary to repeat, and click OK.
 - To indicate to others that you are busy on the selected date, deselect Pencil in.
 - To hide the anniversary from [other users who can read your calendar](#), select "Not for public viewing."
 - To include more information about the anniversary, enter it in the Detailed description field.
- g. Click "Save and Close."

Notes adds the anniversary to the Calendar and Meetings views and marks the specified date busy in your [free time schedule](#) (unless you selected Pencil in).

Tip To view your calendar while you're filling out the anniversary form, click Check Calendar. To return to the anniversary form, press ESC.

5. Creating a Calendar Entry from an Existing Calendar Entry

Select or open the calendar entry you want to use.

- a. Choose Actions - Copy Into - New Calendar Entry.
- b. Change any information you want in the new calendar entry.
- c. Save and close the calendar entry.

D. Ways to Manage Calendar Entries

1. Displaying the Contents of a Calendar Entry

You can display the full contents of a calendar entry to see details that aren't visible in the Calendar view, such as the complete description of an appointment or a meeting location.

To display the contents of a calendar entry, double-click the entry.

To display the contents of a calendar entry in the preview pane, click the entry and choose View - Document Preview. (To change the size of the preview pane, drag the pane's top border.)

Tip When a calendar entry's complete description is not visible in the Calendar view, you can hold the mouse over the entry and Notes will display the description in a pop-up.

2. Repeating a calendar entry

When you create a calendar entry, you can create a set of repeating calendar entries.

- a. If necessary, click New Entry and specify the settings you want.
- b. Click Repeat.
- c. Specify how often you want to repeat the calendar entry in the Repeat field.

- d. Specify the first date for the repeating entry in the Starting date field.
- e. Do one of the following:
 - Click Until and specify the last date for the repeating entry.
 - Click For and specify how long you want to repeat the entry for.
- f. Click OK.
- g. Click "Save and Close."

Note You can create a repeating entry only when you create a new calendar entry. To repeat an existing calendar entry, create the entry again, click Repeat, and specify the repeat information you want before you save and close the entry.

3. Moving a calendar entry

- a. You can use drag & drop to move an entry in the Calendar view.
 - **To move to a new date**
- 1) Click and hold the entry.
- 2) (Optional) To move the entry to a preceding or succeeding page, do the following:
 - Drag the entry to the dog-ear at the bottom left or right corner of the Calendar view.
 - Hold the entry over the dog-ear until the calendar page you want is current.
- 3) Drag the entry to the new date.

4. To move to a new time

- a. Click and hold the entry.
- b. To display the time slots on the date you want, drag the entry over the clock icon in the top left or right corner of the date.

Tip To scroll the time slots on the date, drag the entry over one of the scroll arrows.

- c. Drag the entry to the new time.

Note If you move a meeting entry that you created, Notes sends the invitees a new invitation to the rescheduled meeting. If a room and/or resource is reserved for the meeting, Notes sends the Resource Reservations database a reservation request for the new time.

Tip You can also move a calendar entry by putting the entry in edit mode and changing the entry's date and/or time.

5. Editing a Calendar Entry

- a. Double-click the entry.
- b. Click Edit Document.
- c. Make the changes you want.
- d. Click "Save and Close."

Note If you edit the date, time, or location of a meeting entry that you created, Notes sends the invitees a new invitation to the rescheduled meeting. If a room and/or resource is reserved for the meeting, Notes sends the Resource Reservations database a reservation request for the new time or for the new location.

6. Deleting a Calendar Entry

You can mark calendar entries for deletion and then delete them from your mail database.

- a. Click the entry.
- b. Press DEL.

Notes strikes through the entry and adds it to your mail database's Trash folder.

- c. Refresh or close the database by choosing View - Refresh.

Caution Notes asks if you want to delete the documents (including calendar entries) in the Trash folder. If you select Yes, Notes deletes all of the documents.

- d. Select Yes.

Tip If you mark a calendar entry for deletion and change your mind, you can remove the entry from the Trash folder by clicking the entry and pressing DEL again.

7. Setting an Alarm for a Calendar Entry

- a. If necessary, double-click the calendar entry and click Edit Document.
- b. Click Alarm options.

If you haven't enabled the alarm system, Notes asks if you want to enable it.
- c. If necessary, click Yes.
- d. Do one of the following:
 - Select Before or After and specify the number of minutes before or after the entry that you want to set the alarm for.
 - Select On and specify the date and time that you want to set the alarm for.
- e. (Optional) Specify a different message in the Alarm Message field.

Note Notes uses the entry's description as the alarm message by default.
- f. Click OK.

When you save the entry, Notes sets the alarm.

D. Ways to Schedule Meetings.

1. Inviting People to a Meeting

- a. If you are using the mail database, do the following:
 - If necessary, switch to the Calendar view.
 - Click New Entry or double-click the date of the meeting.
 - Select Invitation.
- b. If you are using the Personal Address Book, do the following:
 - If necessary, switch to the Business Cards or By Category view.
 - Select the names of the people you want to invite to the meeting.
 - Click Schedule Meeting in the action bar.
- c. Enter a description of the meeting in the Brief description field.
- d. If necessary, specify the date of the meeting in the Date field.
- e. Specify the time of the meeting in the Time field.

f. Under Invitations, do one or both of the following:

- Specify the names of one or more users and/or groups in the "Send invitations to" field.
- Specify the names of one or more users and/or groups in the "Optional invitees" field.

Note If you selected names from the Personal Address Book in step 2 above, Notes automatically added these names to the "Send invitations to" field.

g. (Optional) Do any of the following:

- To [find free time for the meeting](#), click "Find Free Time," specify a time that is free for all or most of the invitees, and click OK.
- To prevent invitees from sending you responses to the invitation, select "I don't want responses from the Invitees."
- To [reserve a specific room for the meeting](#), click Reservations, click "Reserve Specific Room," select the room, and click OK.
- To [reserve any available room for the meeting](#), click Reservations and click "Find Available Room," select a site, and click OK.
- To [reserve a resource for the meeting](#), click Reservations, click "Reserve Resources," select the resource, and click OK.
- To [set an alarm for the meeting](#), click Alarm options, specify when you want the alarm to go off, and click OK.
- To [make the meeting a repeating meeting](#), click Repeat, specify how often and for how long you want the meeting to repeat, and click OK.
- To keep the selected time free for other meetings, select Pencil in.
- To hide the meeting from [other users who can read your calendar](#), select "Not for public viewing."
- To include more information about the meeting, enter it in the Detailed description field.

h. Click "Save and Close" and then click Yes.

Notes sends meeting invitations to the invitees in both the "Send invitations to" and "Optional invitees" fields. Notes also adds the meeting to the Calendar and Meetings views and marks the specified time busy in your [free time schedule](#) (unless you selected Pencil in).

Tip To view your calendar while you're filling out the meeting form, click Check Calendar. To return to the appointment form, press ESC.

2. Finding Free Time for a Meeting

When you [invite people to a meeting](#), you can use free time lookup to read the [free time schedules](#) of the invitees and find a time at which all or most of them can meet. You can also find a time at which a specific room and/or resource is free.

- a. If necessary, double-click the meeting entry and click Edit Document.
- b. Do the following:
 - Make sure you have [specified a tentative date and time](#) for the meeting in the Date and Time fields.
 - Make sure you have specified the names of one or more users and/or groups in the "Send invitations to" and "Optional invitees" fields.
 - (Optional) To include a specific room in the free time lookup, click Reservations, click "Reserve Specific Room," select the room, and click OK.
 - (Optional) To include a resource in the free time lookup, click Reservations, click "Reserve Resources," select the resource, and click OK.
- c. Click "Find Free Time."
- d. If the Free Time dialog box displays the message "Scheduled time is NOT OK for everyone," do any of the following:
 - Select a time from the "Recommended meeting times" field.
 - Select "by person" above the free time grid and use the time selection box to the right of the grid to specify a time that is free for all or most invitees.
 - Select "by day" above the free time grid and use the time selection box to the right of the grid to specify a time that is free for all invitees.
 - Click "Change Invitee List," add invitee names, remove invitee names, and/or change the status of invitees to required or optional, and click OK.
 - Specify a different date in the Date field.
 - Specify a different time in the Time field.
- e. When you find a time at which all or most of the invitees can meet, click OK.

3. Tracking Responses to a Meeting Invitation

When you send a meeting invitation, you can display the responses you receive from invitees in the original meeting entry. If you reserve a room and/or resource for the meeting, you can also display the response(s) you receive from the Resource Reservations database.

- a. Double-click the meeting entry.
- b. Click "Display invitee responses."
- c. **Note** If an invitee pencils in a meeting, Notes lists the invitee under "Accepted."
- d. (Optional) To print the current invitee responses, click Print and then click OK.
- e. When you're done viewing the invitee responses, click OK.

Note If the meeting is a repeating meeting or if you selected "I don't want responses from the Invitees" for the meeting, Notes does not display "Display invitee responses" (unless you reserved a room or resource for the meeting).

Tip To view meeting responses organized as response documents to the original meeting invitation, switch to the Meetings view. To view individual meeting responses, switch to the Inbox folder.

4. Rescheduling a meeting

After you invite people to a meeting, you can change the date, time, and/or location of the meeting.

- a. Double-click the meeting entry.
- b. Click Edit Document.
- c. Do any of the following:
 - To change the date, specify a different date in the Date field.
 - To change the time, specify a different time in the Time field.
 - To find free time, click "Find Free Time," specify a time that is free for all or most of the invitees, and click OK.
 - To reserve a specific room, click Reservations, click "Reserve Specific Room," select a room, and click OK.
 - To reserve any available room, click Reservations, click "Find Available Room," select the site in which you want to reserve the room, and click OK.
- d. Click "Save and Close."

When you change the date, time, and/or location of a meeting, Notes sends the invitees a new invitation to the rescheduled meeting. If a room and/or resource is reserved for the meeting, Notes sends the Resource Reservations database a reservation request for the new time or for the new location.

Note If the meeting is a repeating meeting, you can change the date and time of selected occurrences of the meeting but you cannot change the location of the meeting.

Tip You can also reschedule a meeting by [moving the meeting entry](#) in the Calendar view.

E. Ways to Respond to An Invitation

1. Accepting or declining a proposed meeting change

- a. When an invitee proposes a change to the time or location of a meeting that you've called, Notes sends you a counter-proposal message.
- b. If necessary, switch to the Inbox folder.
- c. Open the counter-proposal message.
- d. Click "Accept Counter Proposal" or "Decline Counter Proposal."

If you accept the proposed change, Notes sends the invitees a new invitation to the rescheduled meeting. If a room and/or resource is reserved for the meeting, Notes sends the Resource Reservations database a reservation request for the new time or for the new room.

If you decline the proposed change, Notes sends the invitee who proposed the change a message that says you've declined it.

2. Accepting a meeting invitation

- a. To accept a meeting invitation
 - Open the invitation.
 - Click Accept.

Notes sends a message with your response to the meeting chairperson. Notes also adds the meeting to the Calendar and Meetings views and marks the specified time busy in your [free time schedule](#).

b. To accept a meeting invitation and send comments to the chairperson

- Open the invitation.
- Click Other.
- Select Accept in the "Action to take" field.
- Enter your comments in the "Comments to include" field and click OK.

Notes sends a message with your response and your comments to the meeting chairperson. Notes also adds the meeting to the Calendar and Meetings views and marks the specified time busy in your [free time schedule](#).

Tip To view your calendar while you're responding to the invitation, click Check Calendar. To return to the invitation, press ESC.

3. Removing meeting invitations from the Inbox automatically

You can automatically remove meeting invitations from the Inbox folder after you respond to them.

- a. Choose Actions - Calendar Tools - Calendar Profile.
- b. Click "Advanced Calendar Options."
- c. Select "Remove Invitations from my Inbox after I respond to them" and click OK.

Notes removes invitations from the Inbox folder but does not remove the corresponding meeting entries from the Calendar and Meetings views.

Note If you enable this option and receive a broadcast invitation (an invitation that you don't have to respond to), Notes removes the invitation from the Inbox after you [add the broadcast meeting to your calendar](#).

F. Reading someone else's calendar

If you have "Read public documents" access or at least Reader access to a user's mail database, you can read the user's calendar.

1. Select your mail database.
2. Choose Actions - Calendar Tools - Open Another Calendar.
3. Select an Address Book that contains the name of the user whose calendar you want to read.
4. Select the user's name and click OK.
5. (Optional) To display another folder or view in the user's mail database, drag the left border of the view pane to the right until the navigation pane is visible, and click the folder or view you want.
6. **Note** If you have only "Read public documents" access, Notes displays only calendar-related views such as the Calendar and Meetings views. To display meeting invitations and responses to meeting invitations, switch to the Meetings view.
7. When you are through reading the calendar, press ESC.

Tip To [let other users read your calendar](#), choose Actions - Mail Tools - Delegation Profile and use one of the options under Calendar Access.

G. Ways to Let Others Use Your Calendar

1. Letting Others Read Your Calendar

You can use your delegation profile to give users "Read public documents" access to your mail database. This way, users can read calendar entries (appointments, meeting invitations, meeting responses, events, reminders, and anniversaries) but cannot read any other documents in your mail database.

- a. Choose Actions - Mail Tools - Delegation Profile.
- b. Under Calendar Access, do one of the following:
- c. To give all users "Read public documents" access to your mail database, select "Everyone can read my Calendar."
- d. To give only selected users and/or groups "Read public documents" access to your mail database, specify the names of the users and/or groups in the "Only the following people/groups can read my Calendar" field.
- e. Click OK.

Note If you give a user Reader, Author, or Editor access to your mail database (by specifying the user's name in any of the fields under E-mail Access), Notes automatically gives the user "Read public documents" access.

2. Letting Others Manage Your Calendar

You can use your delegation profile to give users "Read public documents" and "Write public documents" access to your mail database. This way, users can read, create, edit, and delete calendar entries (appointments, meeting invitations, meeting responses, events, reminders, and anniversaries) but cannot read, create, edit, or delete any other documents in your mail database.

- a. Choose Actions - Mail Tools - Delegation Profile.
- b. Under Calendar Access, do one of the following:
 - To give all users "Read public documents" and "Write public documents" access to your mail database, select "Everyone can manage my Calendar."
 - To give only selected users and/or groups "Read public documents" and "Write public documents" access to your mail database, specify the names of the users and/or groups in the "Only the following people/groups can manage my Calendar" field.
- c. Click OK.

Note If you give a user Editor access to your mail database (by specifying the user's name in the "Read, send, and edit any document in my mail file" field under E-mail Access), Notes automatically gives the user "Read public documents" and "Write public documents" access.

H. About Free Time Schedules

Notes uses the information specified under "Allowable free times" in your calendar profile to create your free time schedule. (To make changes to this information, choose Actions - Calendar Tools - Calendar Profile.)

Notes marks the ranges of time specified under "Allowable free times" free (that is, available for meetings) and marks all other times busy (unavailable for meetings). This information is your free time schedule, which Notes stores in the free time information database on your mail server. When users [look up your free time for meetings](#), they can read your free time schedule and see when you're available and unavailable.

When you create an appointment, meeting invitation, event, or anniversary entry, accept a meeting invitation, or add a broadcast meeting to your calendar, Notes automatically marks the specified time busy in your free time schedule. However, if you select "Pencil in" when you

create a calendar entry or pencil in a meeting invitation rather than accept it, Notes does not mark the specified time busy in your free time schedule. This way, you can add an entry to your calendar that you're not certain about without preventing others from inviting you to meetings at the same time.

Note Reading your free time schedule is different from reading your calendar. If a user can read your free time schedule, the user can see the ranges of time during which you're busy but cannot see what you're doing. If a user can [read your calendar](#), the user can read your calendar entries and see what you're doing.

1. Free Time

a. Specifying your free time schedule

You can specify the time during the week that you're normally available for meetings. This way, other users can [look up your free time for meetings](#).

1. Choose Actions - Calendar Tools - Calendar Profile.
2. Under "Allowable free times," select each day that you normally work and specify the hours that you normally work each day.

For example, if you work on Saturdays from 7:00 A.M. to 11:00 A.M. and from 12:00 P.M. to 3:00 P.M., select Saturday and enter 7:00 AM - 11:00 AM, 12:00 PM - 3:00 PM.

3. Click OK.

Note Notes saves the [free time schedule](#) information you specify in a database on your mail server.

Tip To specify the day that is normally the first day of your work week, choose File - Tools - User Preferences, click International, select a day in the "Week starts on" field, and click OK.

b. Specifying who can read your free time schedule

By default Notes lets all users read your [free time schedule](#) so that they can [look up your free time for meetings](#). You can limit who can read your free time schedule to selected users and/or groups.

- 1) Choose Actions - Calendar Tools - Calendar Profile.
- 2) In the "Only the following users can read my Freetime Schedule" field, specify the names of the users and/or groups that you want to read your free time schedule.
- 3) Click OK.

Note Reading your free time schedule is different from reading your calendar. If a user can read your free time schedule, the user can see the ranges of time during which you're busy but cannot see what you're doing. If a user can [read your calendar](#), the user can read your calendar entries and see what you're doing.

Tip To let all users read your free time schedule, leave the "Only the following users can read my "Freetime Schedule" field blank. To prevent all users from reading your free time schedule, specify only your name in the field.